

## Probationary review template

To help agree clear expectations, engage and motivate new employees and make effective decisions. This template should be used to capture information at performance reviews during the probation period. The information will help to ensure an accurate record is available when setting objectives, creating action plans and making decisions.

Details	
Employee name	
MONTH 1	
What do you need to know/learn? How will success be measured?	
What do you need to be able to do? How will success be measured?	
What is going well? <i>[What do you now KNOW? What can you now DO?]</i>	
What's not going well and why? <i>[Any targets not achieved or gaps in knowledge?]</i>	
What feedback do you have? <i>[Anything I/we need to do differently or better?]</i>	
What do we need to change? <i>[Are the targets realistic and achievable?]</i>	
Manager signature	
Employee signature	
Date	/ /

## MONTH 2

What do you need to know/learn? How will success be measured?

What do you need to be able to do? How will success be measured?

What is going well? *[What do you now KNOW? What can you now DO?]*

What's not going well and why? *[Any targets not achieved or gaps in knowledge?]*

What feedback do you have? *[Anything I/we need to do differently or better?]*

What do we need to change? *[Are the targets realistic and achievable?]*

Manager signature

Employee signature

Date

/ /

## MONTH 3 PROBATION REVIEW

What do you need to know/learn? How will success be measured?

What do you need to be able to do? How will success be measured?

What is going well? *[What do you now KNOW? What can you now DO?]*

What's not going well and why? *[Any targets not achieved or gaps in knowledge?]*

What feedback do you have? *[Anything I/we need to do differently or better?]*

What do we need to change? *[Are the targets realistic and achievable?]*

Manager signature

Employee signature

Date

/ /

## MONTH 6 PROBATION REVIEW

This meeting is to agree next steps, E.G. Signing off, extending probation or agreeing to separate paths.

What do you need to know/learn? How will success be measured?

What do you need to be able to do? How will success be measured?

What is going well? *[What do you now KNOW? What can you now DO?]*

What's not going well and why? *[Any targets not achieved or gaps in knowledge?]*

What feedback do you have on the overall induction process? *[Anything I/we need to do differently or better?]*

What can we do to ensure it adds value and prevents problems in future? *[Are the targets realistic and achievable?]*

Manager signature

Employee signature

Date

/ /

## PROBATIONARY DECISION

Employee name

Appoint / Extend Probation / Release

Manager Signature

Date

/ /

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